



Department of Administration
 Purchasing Division
 2019 Washington Street East
 Post Office Box 50130
 Charleston, WV 25305-0130

State of West Virginia
Master Agreement

Order Date: 01-24-2024

CORRECT ORDER NUMBER MUST
 APPEAR ON ALL PACKAGES, INVOICES,
 AND SHIPPING PAPERS. QUESTIONS
 CONCERNING THIS ORDER SHOULD BE
 DIRECTED TO THE DEPARTMENT
 CONTACT.

Order Number:	CMA 0506 2820 MIS2300000003 2	Procurement Folder:	1124314
Document Name:	SURVEY MANAGEMENT PLATFORM	Reason for Modification:	
Document Description:	SURVEY MANAGEMENT PLATFORM	Change Order No. 1 To attach Order Form that has service dates that match contract term.	
Procurement Type:	Central Master Agreement		
Buyer Name:			
Telephone:			
Email:			
Shipping Method:	Best Way	Effective Start Date:	2023-11-01
Free on Board:	FOB Dest, Freight Prepaid	Effective End Date:	2024-10-31

VENDOR		DEPARTMENT CONTACT	
Vendor Customer Code:	000000189175	Requestor Name:	Stephanie F Petry
QUALTRICS LLC		Requestor Phone:	(304) 356-4011
2250 N UNIV PKWY #48C		Requestor Email:	stephanie.f.petry@wv.gov
PROVO	UT		
US	84604		
Vendor Contact Phone:	801-709-2160		
Extension:			
Discount Details:		24 FILE LOCATION _____	
	Discount Allowed	Discount Percentage	Discount Days
#1	No	0.0000	0
#2	No		
#3	No		
#4	No		

INVOICE TO	SHIP TO
BUYER - 304-957-0209	BUYER - 304-957-0209
HEALTH AND HUMAN RESOURCES	HEALTH AND HUMAN RESOURCES
OFFICE OF HUMAN RESOURCES MGMT	OFFICE OF HUMAN RESOURCES MGMT
ONE DAVIS SQUARE, STE 400	ONE DAVIS SQUARE, STE 400
CHARLESTON WV 25301	CHARLESTON WV 25301
US	US

1-20-24 6C

Total Order Amount:	Open End
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Purchasing Division's File Copy

CA 1/25/24
PURCHASING DIVISION AUTHORIZATION
 DATE: *Tara...*
 ELECTRONIC SIGNATURE ON FILE

ATTORNEY GENERAL APPROVAL AS TO FORM
 DATE: *John S. Gray*
 ELECTRONIC SIGNATURE ON FILE

ENCUMBRANCE CERTIFICATION
 DATE: *1-31-24*
 ELECTRONIC SIGNATURE ON FILE

1/30/2024

Extended Description:

Change Order No. 1

To attach Order Form that has service dates that match contract term.

No other changes.

All provisions of the original Contract and subsequent Change Orders not modified herein shall remain in full force and effect.

Line	Commodity Code	Manufacturer	Model No	Unit	Unit Price
1	43232314			EA	167000.000000
	Service From	Service To		Service Contract Amount	
				0.00	

Commodity Line Description: Survey Management Platform

Extended Description:

3.1.1 Survey Management Platform- up to a minimum of ten users

Line	Commodity Code	Manufacturer	Model No	Unit	Unit Price
5	43230000			EA	0.000000
	Service From	Service To		Service Contract Amount	
				0.00	

Commodity Line Description: Additional Users/Licenses

Extended Description:

3.1.1.9 Additional Users/Licenses - each add on user/license
(10 used for bidding scenario only, quantity could increase or decrease during life of contract)

Line	Commodity Code	Manufacturer	Model No	Unit	Unit Price
6	81112200			EA	0.000000
	Service From	Service To		Service Contract Amount	
				0.00	

Commodity Line Description: Service and Support- monthly fee

Extended Description:

3.1.2.1 Service and Support - monthly fee

Line	Commodity Code	Manufacturer	Model No	Unit	Unit Price
10	86132201			EA	40750.000000
	Service From	Service To		Service Contract Amount	
				0.00	

Commodity Line Description: Training

Extended Description:

3.1.2.2 Training

Order Form

Fees Exhibit

License Details

Start Date	End Date	Term in Months
First date of the initial period in the table below	Last date of the final period in the table below	48

Cloud Service Details

Period	Services	Price	Estimated Invoice Date	Payment Terms from Invoice	License Configuration
Year 1: 01-Nov-2023 TO 31-Oct-2024	Cloud Professional	\$165,500.00 \$42,250.00	Effective Date	Net 30	Q-1900085
Year 2: 01-Nov-2024 TO 31-Oct-2025	Cloud Professional	\$167,000.00 \$0.00	02-Oct-2024	Net 30	Q-1900086
Year 3: 01-Nov-2025 TO 31-Oct-2026	Cloud Professional	\$167,000.00 \$0.00	02-Oct-2025	Net 30	Q-1900087
Year 4: 01-Nov-2026 TO 31-Oct-2027	Cloud Professional	\$167,000.00 \$0.00	02-Oct-2026	Net 30	Q-1900088
Total		USD \$708,750.00			

Prices shown do not include applicable taxes. Applicable taxes will be presented on the invoice.

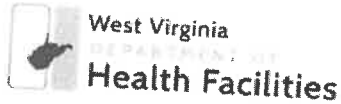
CONFIDENTIAL

Robert Price

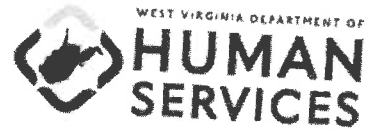
Agree



Sherri A. Young, D.O., MBA, FAAFP
DH Cabinet Secretary



Michael J. Caruso
DHF Cabinet Secretary



Cynthia A. Persily, Ph.D.
DoHS Cabinet Secretary

STATE OF WEST VIRGINIA
DEPARTMENTS OF HEALTH, HEALTH FACILITIES, AND HUMAN SERVICES
OFFICE OF SHARED ADMINISTRATION

Date: January 24, 2024

To: Crystal Husted, CPPB
Senior Buyer, West Virginia Purchasing Division

From: Robert Price, CPPO, CPPB, NIGP-CPP *Robert Price*
Administrative Services Manager II, OFFICE OF SHARED ADMINISTRATION

RE: CMA 0506 2820 MIS2300000003

The Office of Shared Administration respectfully requests a change order be processed to attach a corrected Order Form Fees Exhibit to the above referenced document.

The Order Form Fees Exhibit included with the award document has service dates that do not match the contract term per the award document.

This change order will align the services dates on the Order Form Fees Exhibit with the contract term and will help facilitate contract administration in a clear, concise manner.

Thank you in advance for your consideration of this request. If you have any questions, please do not hesitate to contact me at your earliest convenience.



COMPLIANCE VERIFICATION CHECKLIST FOR REQUISITION SUBMISSION

<i>Purchasing Division Use:</i> Buyer: <u>Crystal Husted</u> Date: <u>1/25/24</u> Solicitation No. <u>CMA MIS23#03</u>	Agency: <small>Departments of Health, Health Facilities and Human Services Office of Shared Administration</small> Procurement Officer Submitting Requisition: Robert Price Requisition No. CRFQ 0506 MIS23*01 PF No.: 1124314
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This checklist **MUST** be completed by a state agency's designated procurement officer and submitted with the Purchase Requisition to the Purchasing Division. The purpose of the checklist is to verify that an agency procurement officer has obtained and included required documentation necessary for the Purchasing Division to process the requisition without future processing disruptions. At the agency's preference, the agency **MUST** either submit the checklist by attaching it to the requisition's Header **OR** by placing it in the requisition's Procurement Folder.

FOR ALL SOLICITATION TYPES:

	Compliance Check Type	Required	Provided, if Required	Not Required	Purch. Div. Confirmation
1	Specifications and Pricing Page included	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2	Use of correct specification template	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3	Use of correct requisition type [CRQS → CCT or CPO] or [CRQM → CMA]	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4	Use of most current terms and conditions www.state.wv.us/admin/purchase/TCP.pdf	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5	Maximum budgeted amount in wvOASIS	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6	Suggested vendors in wvOASIS	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7	Capitol Building Commission pre-approval	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8	Financing (Governor's Office) pre-approval	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9	Fleet Management Division pre-approval	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

	Compliance Check Type	Required	Provided, if Required	Not Required	Purch. Div. Confirmation
10	Insurance requirements				
	Commercial General Liability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Automobile Liability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Workers' Compensation/Employer's Liability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Cyber Liability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Builder's Risk/Installation Floater	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Professional Liability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Other (specify)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11	Office of Technology CIO pre-approval	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12	Treasurer's Office (banking) pre-approval	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

FOR CHANGE ORDERS/RENEWALS:

1	Two-party agreement	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
2	Standard change order language	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
3	Office of Technology CIO approval	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
4	Justification for price increases/backdating/other	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5	Bond Rider (Construction)	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
6	Secretary of State Verification	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
7	State debarment verification	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
8	Federal debarment verification	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

**The items pre-checked are required before a Purchase Requisition may be submitted to the Purchasing Division. Failure to complete and verify this documentation may result in rejection of the requisition back to the agency. It is up to the agency procurement officer to determine if pre-approvals, insurance, or other documentation is needed for the purchase. The referenced information below may be used to make this determination.*

For Purchasing Division Use Only:

I have reviewed the requisition identified above and find that it is sufficient to advertise publicly to the vendor community. My review does not preclude the possibility that the vendor community, or some other entity, will identify an area of concern; however, should such issues or concerns arise, they will be reviewed and addressed as may be appropriate.

Signature: _____

Crystal Husted

REFERENCE:

FOR ALL SOLICITATION TYPES:

1. **Specifications and Pricing Page.** The specifications and intended pricing evaluation tool (wvOASIS line or pricing page) must be attached to the requisition for the Purchasing Division to review them.
2. **Usage of correct specification template.** The Purchasing Division maintains standard format templates on its website for various purchase types, including but not limited to one-time, services, and open-end RFQ purchases; RFPs; and EOIs. Using the correct specification template ensures language appropriate for the type of purchase will be contained in the final contract. A copy of these templates can be found on the Purchasing Division's website at www.state.wv.us/admin/purchase/forms.html.
3. **Use of correct requisition type.** Agencies must discern the type of contract needed prior to entering the requisition in wvOASIS. The requisition type will limit the type of award that can be issued for each solicitation. **Purchasing Division Procedures Handbook, Section 3.3.1.1.**
4. **Terms and conditions.** The agency must complete the General Terms and Conditions using the master copy maintained by the Purchasing Division, and the revision date on the terms and conditions document must not be removed or altered in any way. The Purchasing Master Terms and Conditions can be found on the Purchasing Division's website at www.state.wv.us/admin/purchase/TCP.pdf. **Purchasing Division Procedures Handbook, Section 3.2.4.6.**
5. **Maximum budgeted amount.** This is the maximum amount of funding available for the purchase of the good or service as determined by the agency prior to requisition submission. This amount determines the agency's ability to negotiate and cannot be changed after the bid opening. **Purchasing Division Procedures Handbook, Section 6.9.3.1.**
6. **Suggested vendors.** Suggested vendors are identified at the time an agency conducts its market research and are placed in the Vendor List or Free Form Vendor fields within the requisition. This ensures the vendors are made aware of the bidding opportunity.
7. **Capitol Building Commission pre-approval.** Pre-approval from the Capitol Building Commission is required before any contract can be bid for work requiring a substantial physical change to the state capitol building or surrounding complex, before work begins to a building on the capitol complex if not done under a contract, and prior to processing change orders for work to buildings on the capitol complex above \$40,000. **Purchasing Division Procedures Handbook, Section 7.2.**
8. **Financing pre-approval.** Any loan or extension of credit from a bank or other financial institution by any state agency under the Executive Branch requires pre-approval from the Governor's Office and must be in the best financial interest of the state of West Virginia. **Per memorandum from the Governor's Office.**
9. **Fleet Management Division pre-approval.** Pre-approval by the Fleet Management Division (FMD) is required to purchase vehicles, unless statutorily exempt. Any request made under the authority of the Fleet Management Division to increase an agency's fleet size must be approved by the FMD executive director, and all vehicle purchases, regardless of dollar amount, must be processed through the Purchasing Division. **Purchasing Division Procedures Handbook, Section 7.8.**
10. **Insurance requirements.** **RE Purchasing Division Procedures Handbook, Section 3.2.5.3. Appendix C.**
11. **Office of Technology CIO pre-approval.** In accordance with the Office of Technology's CIO-19-001 policy, all technology procurement requests, unless exempted, require Chief Information Officer (CIO) approval. **Purchasing Division Procedures Handbook, Section 7.3.**
12. **Treasurer's Office (banking) pre-approval.** Pre-approval is required by the State Treasurer's Office for the acquisition of banking goods or services, which includes but may not be limited to accepting payments and receiving funds via electronic commerce. **W. Va. Code §§ 12-1-7 and 12-3A-6.**

FOR CHANGE ORDERS/RENEWALS:

1. **Two-party agreement.** This agreement, confirming the need for the change order, must be signed by both the agency and the vendor. A single letter of agreement with both signatures is standard.
2. **Standard change order language.** The Purchasing Division maintains standard language to be used in the Extended Description field when issuing a change order in wvOASIS. There are various descriptors available to address the change to the original contract, including but not limited to a standard renewal, a renewal with an increase or decrease, a construction extension for time only or time and increase, a cancellation, and an administrative change. **Purchasing Division Procedures Handbook, Appendix D.**
3. **Office of Technology CIO pre-approval.** See #11.
4. **Justification for price increases/backdating/other.** Any change order request that increases the amount of the contract, is backdated more than 20 days past the submission date of the change order, or otherwise affects provisions of the contract not typically seen in a change order requires justification.
5. **Bond rider.** A bond rider allows bonded principals to request changes to be made to their original surety bond agreements. The bond rider is the only valid way of making changes to a bond agreement which does not invalidate the agreement.
6. **Secretary of State verification.** Unless a waiver is obtained from the Secretary of State's Office, every vendor organized as a business entity must have a certificate of authority and be in good standing with the Secretary of State's Office. To search for a business with the Secretary of State's Office, visit <http://apps.sos.wv.gov/business/corporations>. Any vendor that cannot be found or shows a status of "revoked" or "dissolved" is not eligible for award until the issue is resolved. Agencies must verify this compliance manually prior to award and include a copy of the relevant record in the agency file. **Purchasing Division Procedures Handbook, 5.3.2. Vendor Compliance. E. Secretary of State.**
7. **State debarment verification.** Pursuant to *West Virginia Code* §5A-3-33c and 33d, the State of West Virginia and its political subdivisions may not solicit offers from, award contracts to, or consent to subcontract with a debarred vendor during the debarment period. A list of vendors debarred by the West Virginia Purchasing Division can be seen online at www.state.wv.us/admin/purchase/debar.html. **Purchasing Division Procedures Handbook, 5.3.2. Vendor Compliance. D. State Debarment.**
8. **Federal debarment verification.** Vendors must verify that a vendor is not debarred by the federal government prior to awarding a contract by visiting Sam.gov. Instructions for manually checking a vendor's federal debarment status can be found online at https://www.fsd.gov/qsafsd_sp?id=kb_article_view&sysparm_article=KB0036199&sys_kb_id=b372dadb1b4ac5d40ca4a97ae54bcbb2&spa=1. **Purchasing Division Procedures Handbook, 5.3.2. Vendor Compliance. C. Federal Debarment.**

Questions regarding this *Compliance Verification Checklist for Requisition Submission* may be directed to your assigned Purchasing Division buyer. If you're unsure who your buyer is, see the Agency-Buyer assignments published online at www.state.wv.us/admin/purchase/byrassign.pdf.

Keyword Search

For more information on how to use our keyword search, visit our help guide

Simple Search

Search Editor

- Any Words (i)
- All Words (i)
- Exact Phrase (i)

e.g. 123456789, Smith Corp

"qualtrics llc" ×

Entity ∨

Location ∨

Status ∧

- Active
- Inactive

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Business Organization Detail

NOTICE: The West Virginia Secretary of State's Office makes every reasonable effort to ensure the accuracy of information. However, we make no representation or warranty as to the correctness or completeness of the information. If information is missing from this page, it is not in the The West Virginia Secretary of State's database.

QUALTRICS, LLC

** See Attached **

Organization Information								
Org Type	Effective Date	Established Date	Filing Date	Charter	Class	Sec Type	Termination Date	Termination Reason
LLC Limited Liability Company	10/2/2018		10/2/2018	Foreign	Profit			

Organization Information			
Business Purpose	5182 - Information - Data Processing, Hosting, and Related Services - Data Processing, Hosting and Related Services		Capital Stock
Charter County		Control Number	0
Charter State	DE	Excess Acres	
At Will Term	A	Member Managed	MBR
At Will Term Years		Par Value	
Authorized Shares		Young Entrepreneur	Not Specified



Addresses

Type	Address
Designated Office Address	333 W RIVER PARK DR PROVO, UT, 84604
Mailing Address	333 W RIVER PARK DR PROVO, UT, 84604 USA
Notice of Process Address	QUALTRICS LLC 333 W RIVER PARK DR PROVO, UT, 84604
Principal Office Address	333 W RIVER PARK DR PROVO, UT, 84604 USA
Type	Address

Officers

Type	Name/Address
Member	QUALTRICS INTERNATIONAL INC 333 W RIVER PARK DR PROVO, UT, 84604
Type	Name/Address

Annual Reports

Filed For
2024
2023
2022
2021
2020
2019
Date filed

For more information, please contact the Secretary of State's Office at 304-558-8000.

Tuesday, January 23, 2024 — 5:17 PM

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Address

Address Type	Street 1	City	State/Province	Zip/Postal Code	Principal Contact
✓ Payment	DEPT 880102	PHOENIX	AZ	850389650	
Payment	333 W RIVER PARK DRIVE	PROVO	UT	84604	
Payment	2250 N UNIV PKWY #48C	PROVO	UT	84604	Tracie Christensen
Ordering	2250 N UNIV PKWY #48C	PROVO	UT	84604	Tracie Christensen

First Prev Next Last

Save [Undo](#) [Delete](#) [Insert](#) [Copy](#) [Paste](#)

Vendor/Customer : 000000189175
 QUALTRICS LLC

Address Type : Payment

Division/Department :

Additional Address Info. :

Prevent New Spending :

Default Currency : USD - US Dollar

Active From : 06/16/2016

Active To :

Default Record :

Mail Returned :

Active Address : Yes

Address Information

Address ID : AD000001

Street 1 : DEPT 880102

Street 2 : PO BOX 29650

City : PHOENIX

State/Province : AZ

Zip/Postal Code : 850389650

DUNS :

Extended DUNS :

Unique Entity Identifier :

CAGE Code :

Country Phone Code : 1

Phone : 000-000-0000

Phone Extension :

County :

County Name :

Country : US

▶ Prenote/EFT

▶ Remittance Advice

▶ Contact Information

▶ Contact Address Information

▶ Geographic Designation

▶ Change Management

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[Vendor Transaction History](#)